

Operation Excellence: A Community-School Initiative

By Brett Pawlowski



The vast majority of business and education partnerships focus on improving student outcomes through direct or indirect engagement at the classroom or individual student level.

However, there are other opportunities for engaging the business community, and for those willing to think outside the classroom, the rewards can be quite remarkable.

One example comes from the Montgomery County Business Roundtable for Education (MCBRE), a non-profit operation in Montgomery County, Maryland (north of Washington, D.C.). One of MCBRE's first community and school initiatives, Operation Excellence, is an example of a nontraditional partnership

model that fully leveraged the time and talents of business partners and had a dramatic influence on school, and ultimately student, outcomes.

The Origin of Operation Excellence

When Jerry Weast joined Montgomery County Public Schools (MCPS) as superintendent in 1999, he brought with him a firm belief in the value of building strong relationships with the business community. Having seen the effect of such relationships in previous districts, he immediately began reaching out to local business leaders.

Weast was one of the local leaders behind the formation of MCBRE in 2000. The organization was founded, and continues to operate, as a bridge for the creation of strategic business-education partnerships, focusing on connecting classroom learning to the workplace and on improving the quality of school operations. MCBRE emphasizes communication and collaboration between the district and the business community. Weast sits on the board, and district officials are involved in designing and planning major initiatives.

Within two years of the organization's founding, Michael Subin, president of the Montgomery County Council, asked the executive director of MCBRE to coordinate a study of targeted business operations of the district. According to the Operation Excellence summary report, the goal of the project was "to use business acumen to identify ways of making some of the MCPS business processes more efficient and effective with the idea of re-allocating the savings to the instructional programs of MCPS, which directly benefit the children of the county."

Although district leaders in some areas would be wary of such an initiative, MCPS leaders embraced the opportunity due in part to three factors:

- The superintendent placed a high priority on community engagement, particularly on bringing the business community into school operations as true partners.
- The project was proposed to increase resources flowing into instruction, not simply to reduce budgets overall.
- Although MCBRE was a new organization, school and community leaders had worked on a similar initiative in 1993, the Corporate Partnership for

Managerial Excellence. The majority of the partnership's recommendations had been implemented, and all parties viewed it as a success.

Project Design and Implementation

MCBRE selected two people to structure and lead the initiative. The first was a representative of the business community who sat on MCBRE's board: Jane Rudolph, vice president of strategic analysis and development for Lockheed Martin. The second was Larry Bowers, chief operating officer for MCPS.

Working together over the course of several weeks, those project leaders identified four operational areas to review, based in part on Bowers's analysis of where improvements could be made and efficiencies found:

- Facilities management
- Financial management
- Technology management
- Baldrige certification

According to Larry Bowers: "This was a partnership that allowed businesspeople to share their expertise on the operations side of the shop. It can be difficult to involve people on the education side because for some it's not their background, but when it comes to business operations, they're extremely familiar and have a great deal to offer."

Once they had identified the target areas, Rudolph and Bowers, with the help of MCBRE staff, put together a set of strategic questions for each area, a step that helped guide their selection of business partners. Altogether, Operation Excellence recruited 25 business leaders and 13 district leaders to fulfill the goals of the project.

MCBRE recruited people based on their individual expertise, regardless of whether their companies focused primarily in the target area in question. As Jane Rudolph notes: "Lockheed Martin supported the team with people out of our financial community to help look at their financial systems. That's not normally what you would think about Lockheed Martin doing, but as we saw where their needs were, we looked across our organization to see how we could contribute to the effort. Clearly, we work with large-scale financial systems here, and we wanted to bring that experience and expertise to look at their systems to see what they might need to make them more efficient."

Once teams had been assembled in each focus area, they were given three months to analyze current operations, review options, and make recommendations. Each team established its own structure, work flow, and meeting schedule. A kickoff was held at the County Office Building on June 18, 2003, and the business leaders submitted the results to MCBRE on or about September 25, 2003. The final recommendations document was made public in October 2003 in a presentation to the Montgomery County Council.

Operation Excellence

Where: Montgomery County, Maryland.

Partners: Montgomery County Business Roundtable for Education (MCBRE); Montgomery County Public Schools (MCPS); multiple individuals representing various businesses.

Challenge: Find efficiencies in district operations so that freed-up funds can enhance instructional efforts.

Solution: Working with representatives of MCPS and the local business community, MCBRE targeted four operational areas and assembled a team to study each and provide suggestions for improvement.

Partner roles: Two community leaders, Jane Rudolph of Lockheed Martin and Larry Bowers of MCPS, led the project, identifying areas of study and working with MCBRE staff to recruit and manage partners for each team. Team members worked together for three months to analyze existing operations and make recommendations.

Outcomes: The district realized several direct and indirect outcomes. It was able to rethink strategic approaches to building maintenance and cleaning and lobbied for new equipment, all of which significantly reduced hiring needs in those areas. Further, acquisition of software in call center and financial operations improved capabilities in those areas.

Indirectly, several of the business partners continued their support for the district after the project ended, and many gained knowledge they could apply to their own work. Through this and other community engagement efforts, the district continues to build support throughout the county.

Direct Outcomes of Operation Excellence

After MCPS and the county council reviewed the partners' recommendations, they decided to implement several, including allocating funds from the council for needed software and equipment. Larry Bowers highlighted some examples:

- The partners found that the district's financial management software, first purchased in 1983, was incapable of meeting current needs. They identified a new system with the necessary features, and the business partners successfully lobbied the county council for the funding. "Businesspeople are influential advocates," said Bowers. "Elected officials look to business leaders for input."
- Business partners also lobbied for the purchase of equipment that allowed the district to forgo hiring additional building services staff.
- The partners established a different strategic approach to cleaning, going from a model where one person handled all duties within an area to a model where a team moved through a facility together.

- Maintenance staff are deployed differently as a result of the team's recommendations. They have significantly reduced staff time on the road by having staff handle multiple work orders with each site visit, going to the extent of cross-training some staff members to increase their capabilities. Materials delivery models were also restructured.
- Call center operations, particularly those in the district's employees and retiree services office, were improved as well. United Healthcare was particularly helpful in giving team members a tour of its call center facility, walking them through United Healthcare's operations, helping the district choose and purchase call center software, and helping set up a center within the district office.

As a result of these and other improvements, the district has hired no additional maintenance staff since 2003.

As a result of these and other improvements, the district has hired no additional maintenance staff since 2003, despite adding six million square feet of facility space. (Additional staff have been hired in building services, but not at all in proportion to this growth.)

Indirect Outcomes

In addition to the cost savings and improvements resulting from this campaign, the district has realized several indirect outcomes.

First, many of the business partners involved in Operation Excellence have continued to support the district and to advocate on its behalf. That support has been helpful in ongoing improvement efforts and, more broadly, in advocating for the district with the county council and others.

Although the school district was the intended beneficiary of this project, many of the participating businesspeople reported learning a great deal through the process as well, particularly in areas such as the implementation of Six Sigma programs (used by MCPS as part of its Baldrige efforts).

Also, according to Jane Rudolph: "One thing we learned through this process is that, in a number of areas, MCPS is doing a fabulous job—there were really no efficiencies to be gained. It's good to have that kind of information about a public institution—it instills confidence on the part of businesses and others in the community."

Due in part to the district's openness to this effort, and the respect it earned from its business partners,

MCPS continues to garner support and strengthen its reputation within the community. According to Larry Bowers, the district has seen a net increase of 6,000 students coming from private institutions over the last eight years, and its market share has increased from 80% to 84% of school-age children in that time.

And the collaborative approach the parties brought to Operation Excellence has helped MCBRE and MCPS build a strong and trusting working relationship that has allowed for additional successes over the years. According to Heather Schwager, executive director of MCBRE: "Since 2003, MCBRE and MCPS have worked together to support the district's efforts on project management, diversity and inclusion in the workplace, and the impact of generational differences in the education process. All of these initiatives were made possible thanks to the groundwork laid by Operation Excellence."

Although business-education partnerships that call on the professional expertise of the business community may not be common, the work of those involved in Operation Excellence shows that they can have a dramatic effect on district operations and on stakeholder relations. As district leaders work to address the challenges presented by today's economic climate, they should consider the benefits of such initiatives and approach their business partners accordingly.

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ASBO Past President Jerome Brendel Honored



Jerome Brendel, RSBA, past president of ASBO, was honored recently with Illinois ASBO's Ronald E. Everett Distinguished Service Award. The award recognizes individuals for their "diligence, superior performance, and achievements in service to the school business public."

Beginning his career in education as a science teacher, Jerry moved through the ranks of school administration and into district administration, where he has served as director of business support services, assistant superintendent for business, and superintendent. He currently is superintendent of Woodridge School District 68 in Illinois.

His commitment to school business management is evident in the wide range of positions he has held with the Illinois Association of School Business Officials and ASBO International.